

AMENDING EQR DATA

TRANSACTION DATA:

When transaction data needs to be revised after it has been submitted to FERC, there are four ways to do it:

1. Go into the application and make the desired changes and/or additions manually in the system. This method is best used when there are only a few changes to be made.
2. Use the Append Data function (under Import) to import additional data that was missing from the original filing. This will add transactions to your EQR without overwriting the data that exist in your system. Be sure to use Transaction Unique Identifiers (T#'s) and Transaction IDs that are not already being used in the existing data.
3. If some of the transactions are incorrect, use the Import Revised Transactions function (under Import). Format the revised transactions in the appropriate CSV format, ensuring that the Transaction IDs for the revised data exactly match the Transaction IDs for the data you wish to replace. Select Import Revised Transaction and perform the import. The system will replace the "bad" transactions with the new data. (It deletes the existing transactions with Transaction IDs that match the Transaction IDs in the new data, and appends the new data. Be aware that all rows of a transaction with the selected Transaction ID will be overwritten. Therefore, if you are just changing one row of a transaction, all the unchanged rows with that Transaction ID will need to be included in the revised data import.) The Import Revised Transactions function is useful when you have a lot of transactions to revise. An example of its use would be if a utility sells into a market (such as California) which does not provide detailed price data for the last month of the quarter in time to file the EQR. The initial EQR filed would use price estimates. When actuals become available, that block of transactions could be revised using the Import Revised Transactions feature.
4. Finally, if there is a problem with all of the transactions reported, a new import file can be created (according to our format) and imported just as the initial import was performed. The new data will completely overwrite the previously filed transaction data.

In all of these cases, once the data has been updated, the EQR must be resubmitted to FERC in the same manner as the original submission. (Revising the data on your system does not automatically update your data at FERC, it has to be resubmitted.)

When data is revised after it has been filed at the Commission, it is tagged with a new date indicating that it has been amended. This tagging is done on a row by row basis. When the data is resubmitted, the entire file is sent to FERC. Both the original and the new submission are stored in our database. FERC staff can see which records have been changed. Currently, for the purposes of the dissemination system, the revised filing replaces the previously submitted EQR.

CONTRACT DATA:

To revise contract data that has already been filed, there are two ways to proceed:

1. Go into the EQR application and make the desired changes and/or additions manually in the system. This method is best used when there are only a few changes to be made.
2. Use the Append Data function (under Import) to import additional data that was missing from the original filing. This will add contracts (and/or contract products) to your EQR without overwriting the data that exist in your system.

Please note that if you re-import contract data (as opposed to using the append function), the system will delete all transactions previously entered for that quarter. Therefore, it is not advisable to change your CSV file and use the regular import function to change contract data. If you do that, you will need to re-import all of your transactions.

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